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U.S. Department of Agriculture • Foreign Agricultural Service • Washington, D.C.

# foreign agriculture circular

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FCOF 4-73 October 1973

WORLD COFFEE HARVEST LOWER FOR 1973-74

### Summary

Inclement weather in several important coffee producing countries has contributed to prospects of a much lower world coffee harvest in 1973–74. Total production is now estimated to be 66.1 million bags (132.276 pounds each), with an exportable production of approximately 46.1 million bags. Exportable production, as considered in this report, represents total harvested production less domestic consumption in producing countries.

The currently estimated production level is 13 percent below the revised 1972–73 production estimate of 76 million bags. Exportable production in 1973–74, however, will be almost 19 percent lower than the revised 1972–73 estimate of 56.5 million bags and will necessitate an even further drawdown in world stocks than originally anticipated.

Intense and continuing rains from late September to mid-October 1972, as well as frost damage, reduced Brazil's crop, while drought has plagued much of the equatorial belt over the past year. The 1973–74 coffee harvest of the Ivory Coast, Indonesia, Ethiopia, and Kenya have been particularly affected by the lack of rain. Partly offsetting those expected lower harvests, however, good growing conditions and higher yields are anticipated in Angola and Colombia.

U.S. green coffee imports during the first half of 1973 were 20 percent higher than in the first half of 1972, while U.S. soluble coffee imports jumped 54 percent during the same period. European green coffee imports were 9 percent higher than in 1971—reaching a record level.

#### Production

North America. Dry weather late in the flowering seasons of both Guatemala and El Salvador is primarily responsible for reducing the 1973–74 production estimate of North America to 13.1 million bags—a

decline of 3 percent. Production in 1972–73 has been revised upward—largely because Guatemala's production is greater than previously estimated.

El Salvador's prospects for a good year in 1973-74 appear dim with dry weather at flowering now reported to have damaged the lowland producing areas and part of the central high zones. The higher regions with the greatest production were also hurt—but suffered much less damage. In order to assess the extent of that drought-induced damage, the Government's coffee research institute (ISIC) is conducting a survey of the main coffee producing areas. Latest available information indicates that 1972-73 production was 2.1 million bags, down slightly from the previous estimate.

**Mexico**'s 1973–74 production continues to be assessed at 3.9 million bags, with 2 million bags available for export.

Guatemala's harvest in 1973-74 is now estimated at about 2 million bags—based upon some dry season loss of flowering and the increased activity of pests—principally the coffee leaf miner. Intense and prompt efforts undertaken jointly by the Government and farmers to eradicate the coffee berry borer have slackened, and are now left to the growers (and their association Anacafe). Luckily, farmers contend, the added costs of pest control can be borne under current favorable coffee prices.

However, additional aspects to Guatemala's approaching coffee harvest will be the problems of reduced labor availability caused by competition from increased cotton plantings, and higher fixed costs of production caused by higher minimum wages paid to those available agricultural workers.

Total production for Guatemala in 1972-73 has been revised upward to 2.1 million bags, while exportable production has been revised to 1.8 million bags. Exports and supplies still in the hands of producers and miller-exporters are larger than anticipated.

Production estimates for Costa Rica remain at 1.4 million bags and 1.3 million bags for 1973-74 and 1972-73, respectively. Exports are running slightly higher than last year and carryover stocks should remain small.

Coffee production in the **Dominican Republic** has been increasing and with the incentive of higher prices and continued favorable weather conditions, production could reach a record yield of 750,000 bags in 1973–74. The estimated harvest in 1972–73 has been slightly revised to 720,000 bags.

Nicaragua's production estimates for 1973-74 and 1972-73 remain at 700,000 and 600,000 bags, respectively. Exports in the January-June 1973 period, however, were more than double the pace of the same period in 1972, indicating a substantial drawdown in carryover stocks as producers and exporters take advantage of current high prices.

South America. Coffee production in South America is now estimated at 27.8 million bags—reflecting a drop of about 33 percent from the revised 1972–73 production estimate of 37 million bags. Prospects in Brazil appear even gloomier, with the adverse effects of the July 1972 frost compounded by inclement weather later and the sharply higher incidence of coffee borer (broca) damage. Favorable weather conditions have prevailed in Colombia, however, and expectations of a record crop are high.

Brazil's 1973-74 frost-damaged crop is now estimated at 16 million bags, necessitating a sharp drawdown in carryover stocks if domestic and export requirements of 9 and 18 million bags, respectively, are to be satisfied. Two weeks of intense and continuous rain from late September through mid-October 1972, evidentally exacerbated the already frost-affected situation in Paraná State. Damage from broca and bicho mineiro is apparently running high in São Paulo and Minas Gerais, with a consequent sharp drop in coffee bean quality. Production in Brazil is now estimated at 25.5 million bags for the 1972-73 harvest. Large supplies from this crop still are held in private hands.

The rust problem continues to expand and intensity, threatening a significant reduction in Arabica production over the next few years. Unfortunately, the number of farmers who took the problem seriously was very small and effective control measures have been applied sporadically. Many trees have been seriously weakened by massive, premature leaf drop, and although there is little impact on the 1973–74 crop, the rust will almost certainly imperil the optimistic expectations for the 1974–75 harvest.

Estimates of Colombia's 1973-74 harvest have been increased to 8.5 million bags. Although the Government is not encouraging increased production, higher world prices have resulted in improved cultural practices and increased plantings of the high-yielding Caturra varieties. These factors, plus favorable grow-

ing conditions, are the basis for Colombia's optimistic outlook.

Production level in **Peru** is ostensibly attributed to low temperatures and rain during the flowering season. A more cogent reason may be farmer inertia caused by concern over the Government's Agrarian Reform policy.

The Ministry of Agriculture recently revised its regulations and procedures for the commercialization of both the domestic and export coffee markets. The public coffee marketing organization (EPSA) will continue handling all exports but preferences in terms of supply and quality, will now be given the domestic market instead of the export market, and price priorities for exports will now be given to coffee produced and marketed by cooperative organizations.

Africa. Africa's expected 1973-74 coffee output has been increased slightly since it now appears that Angola's harvest will be larger than originally anticipated. However, because of the drought-damaged crop in the Ivory Coast, total African production is still expected to be about 5 percent lower than last year.

In Angola both the 1973–74 and 1972–73 crop estimates have been revised upward to 3.6 and 3.5 million bags, respectively. Apparently, lower-than-normal rainfall only affected the now-marginal Amboim plantations, and coffee rust disease, though present, is well controlled in the Arabica-producing Andulo region.

Coffee production in the **Ivory Coast** is expected to approximate 4 million bags in 1973–74, down 20 percent from the revised estimate of 5 million bags in 1972–73. This may be optimistic since the drought generally prevented the flowers from setting into cherries and there have been reports it was serious enough to cause the death of new trees in the Ganoa area.

Kenya's coffee harvest in 1973-74 is still estimated at 950,000 bags but now reflects a decline from last year's revised record crop of 1,050,000 bags. Drought has affected the Embu and Meru areas and there are signs the coffee has prematurely started drying on the trees. If the erratic rainfall pattern continues throughout 1973, other areas without overhead irrigation facilities such as the cooperative sector, may also have a reduced crop.

Asia and Oceania. Since Indonesia has suffered from the same drought plaguing much of the equatorial belt the past year, the 1973–74 production estimate has been revised to 2.3 million bags.

India's production will be somewhat lower in 1973–74, although the Coffee Board is taking steps to disseminate technical information and extend liberalized credit to small growers (accounting for 40 percent of coffee production). The 1973–74 crop, now estimated at 1.6 million bags, is still higher than the revised 1972–73 crop of 1.5 million bags, which was affected by untimely rains and plant pests.

#### Trade

United States. Green coffee imports by the United States during the first half of 1973 were approximately 12.2 million bags, an increase of 20 percent over the 10.2 million bags imported in the first half of 1972. The higher imports resulted in a build up of stocks.

Imports from Brazil declined sharply to only 20 percent of the total U.S. market, from 32 percent of the market in the same period of 1972. The decline corresponded to a jump in imports from other Latin American countries who increased their market share from 36 percent to 46 percent of the total market. Mexico and Central America, in particular, increased their share substantially—from 12 percent in the first half of 1972 to 25 percent in the first 6 months of 1973.

Soluble coffee imports continued to grow in the first half of 1973—increasing 54 percent over the comparable period in 1972—to a total of 864, 292 bags (green bean equivalent). Brazil continued to be the major supplier to the U.S. market with shipments of 536,568 bags (green bean equivalent), which represented 62 percent of the total U.S. soluble import market.

In contrast to rising green and soluble coffee imports, coffee roastings during the first half of 1973 remained at their first half 1972 level of about 10.3 million bags.

Europe. According to trade sources, European green coffee imports reached a record level of 29.3 million bags in 1972—an increase of almost 9 percent over 1971 imports of 27 million bags. Of that volume, 18.9 million bags (65 percent) were imported from the Western Hemisphere, 8.6 million bags (30 percent) came from Africa, and 1.8 million bags (5 percent) came from Asia and Oceania.

Robusta sales were up slightly—from 7.6 million bags to 7.7 million bags—but actually declined as a proportion of total sales to 26.5 percent from 28 percent.

## Other Developments

IACO. The 17-member Inter-African Coffee Organization met in late July to formulate its own concerted policy on Robusta sales in the absence of economic clauses in the proposed extension of the International Coffee Agreement. Members of this Organization produce about 23 percent of the world's coffee and about 90 percent of the world's total Robusta coffee.

Reflecting their conviction that a quota system is essential in coffee marketing, the members agreed to limit their sales of Robusta to 11-13 million bags during the 1973-74 coffee year in an effort to raise prices they claim were adversely influenced by the devaluation of the dollar. A special committee of major African producers—Cameroon, Uganda, Ivory Coast, Portugal, and Zaire—was established to monitor the African crop and impose sanctions on members disregarding the quota.

The Organization also will try to convince Latin American and Asian coffee producers that Africans need a greater share of world coffee sales in any future international agreement, and that Robusta prices should be fixed nearer Arabica prices.

**Producers' Conference.** In an attempt to obtain "reasonable prices," about 30 coffee producers agreed August 30, 1973, to withhold 5.5 million bags of coffee—10 percent of the average exports of the last 3 years—from the market in the 1973–74 coffee year. These producers, accounting for approximately 80 percent of world coffee production, expect to supply the market with 52.5 million bags out of estimated import consumption needs of 56.5 million bags.

Describing their marketing system as one of "controlled retention," each producing country will either deposit the coffee it has been allocated to retain in a bonded warehouse, or acquire a bank guarantee as proof the coffee exists. These documents must then be sent to an eight-member administrative board as evidence of compliance with the retention plan.

The five-member committee of Robusta producers, established last month by IACO, met privately and agreed not to sell Robusta coffee below a minimum, though unspecified, price level. The committee also agreed to limit first quarter Robusta sales to an undisclosed level below the Robusta quarterly share of the 52.5 million bags agreed upon at the producers' conference. Such actions are aimed at improving Robusta prices and bringing down stocks of Robusta coffee held by consumers—estimated by the committee to exceed "normal" levels by about 2 million bags.

Marketing Corporation. Brazil, Colombia, and the Ivory Coast—accounting for about 50 percent of the world's coffee production—have announced they have set up a joint multinational coffee marketing corporation open to any producing country. The corporation is expected to intervene directly, or indirectly, through third parties to compete with other buyers in the purchase of coffee it considers is being offered cheaply—with a view to selling it advantageously.

COFFEE: GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1964-65/1968-69: ANNUAL 1969-70/1973-74 1/
IN THOUSANDS OF 8AGS 2/

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TUDAY COAST.   3,605   4,600   4,600   4,600   5,000   4,000   4,600   5,000   4,000   4,600   5,000   4,000   1,000											
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NIGERIA	LI8ERIA										
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TOTAL	JUANUA	2.707									
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1,199	TOTAL	17,131	19,549	19,817	19,774	20,709	19,593				
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MALAYSIA											
PORTUGUESE TIMOR	MALAYSIA										
PORTUGUESE TIMOR	PHILIPPINES										
YEMÉN	PORTUGUESE TIMOR	45	50	50	65	65	60				
TOTAL											
CEANIA!  NEW CALEOONIA	YEMEN	70	60		60	60					
NEW CALEOONIA	TOTAL	4,225	4,388	5,310	4,523	5,090	5,027				
NEW GUINEA		24	24		-5		25				
NEW HEBRIOE5					25	25	25				
TOTAL 241 445 480 507 552 <b>577</b>											
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WORLD TOTAL 64,494 66,362 58,321 71,744 75,982 66,117											
1,11	WORLD TOTAL	64.494	66.362	58.321	71.744	75.982	66.117				
		0.1477	00,002	,	1.1144	.54702	00,00				

1/ Coffee marketing year begins about July in some countries and in others about October. 2/ Of 60 kilograms each. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop barvested principally during June-October 1971 in that country is shown as production for the 1971-72 marketing year. In Ecuador, however, this is referred to as the 1970-71 crop.

Note: Production estimates for some countries include cross-border movements.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1964-65/1968-69, ANNUAL 1969-70/1973-74 1/

EGIDN AND COUNTRY	AVERAGE 1964-65/1968-69	1969-70	1970-71	1971=72	1972-73	1973-74
ORTH AMERICA:						
CDSTA RICA	1,000	1,250	1,095	1,190	1,165	1,240
CU8A						
DDMINICAN REPUBLIC EL SALVADDR	429	450	SOS	490	490	\$15
GUADELOUPE	1.893	2,350 3/	2,015 3/	2,440 <u>3</u> /	1,935 <u>3</u> /	2,130 <u>3</u> /
GUATEMALA	1,567	1,510	1,590	1,845	1.840	1,735
HAITI	339	260	350	370	345	320
HONDURA5	347	445	460	525	\$45	515
JAMAICA AND OEP MARTINIQUE	8	5	1	2		1
MEXICO	1,520	1,575	1,680	1,835	2,000	2,000
NICARAGUA	468	495	570	615	510	605
PANAMA	19	18	9	18	15	15
TRINIDAD-TOBAGD	49	33	53	27	41	28
US-HAWAII	1S 10					
TDTAL	7,664	8,391	8,328	9,357	8 . 886	9,104
DUTH AMERICA!						
80LIVIA	38	SS	6S	65	65	65
COLDMBIA	13,589 6,624	10,2 <b>5</b> 0 7,080	1.500 6.390	14,850 S,750	16,500	7,000
ECUADOR 4/	773	4 <b>S</b> 0	1,080	875	6,660 760	6,960 750
GUYANA	2	2				750
PARAGUAY	41	25	_13	43	38	40
PERU	664	720	760	800	800	770
SUR INAM	3 231	3 285	1 265	300	1 430	45 <sub>0</sub>
TOTAL	21,965	18,870	10,074	22,684	25,254	16,036
FRICAL	2.001	2 200	3 200	2 200	2.460	2.500
ANGDLA	3:081 241	3,200 235	3,200 345	3,300 39S	3,4S0 345	3,500 34S
CAMERDON	1.024	1,170	1,125	1,220	1,220	1,095
CAPE VERDE ISLANDS	2	1				
CENT AFRICAN REP	154	195	150	165	170	180
COMDRD ISALNOS	1	1	1	1	1	. 1
CDNGD: 8RAZZAVILLE DAHOMEY	18 18	14 13	14 14	13 14	13	11
EQUATORIAL GUINEA	121	110	115	110	14 110	12 100
ETHIOPIA	1,331	1,375	1,450	1,490	1,630	1,520
GABON	17	18	14	9	14	9
GHANA	60	81	62	67	57	57
GUINEA	143	190 4,535	145	9S	120	110
KENYA	3,SS3 764	880	3,9S0 988	4,325 973	4,925 1,022	3,92S 920
LIBERIA	59	70	80	773 78	80	7S
MALAGASY REPUBLIC	842	710	1,175	835	865	860
NIGERIA	42	30	65	S5	70	65
RWANDA	172	135	255	245	220	235
5AO TOME-PRINCIPE SIERRA LEDNE	<b>S</b> 82	2 85	120	1 90	120	110
TANZANIA	773	760	120 930	830	120 780	110 780
TDG0	189	217	197	197	197	177
UGANDA	2,693	3,335	2,985	2,830	2,830	2,880
ZAIRE (CONGD+K)	915	1,025	1,150	1,200	1,235	1,335
TDTAL	16,298	18,387	18,531	18,535	19,489	18,303
SIAI						
INDIA	507	410	1,150	435	725	81S
INDONESIA	1.588	1,500	1,450	1,320	1,450	1,175
MALAYSIA						
PHILIPPINESPDRTUGUESE TIMOR	40	45	22 40	60	60	SS
VIETNAM SOUTH		3/	3/	3/	3/	35 <u>3</u> /
YEMEN	3/ 61	50	<u>\$</u> 0	50	50	50
TOTAL	2,196	2,005	2,712	1,865	2,285	2,095
CEANIA:						
NEW CALEDDNIA	28	19	8	15	15	15
NEW GUINEA	185	404	456	474	15 519	543
NEW HEBRIDES	4	2	1	1	1	1
		425	46S	490	\$35	SS9

1/ Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. 2/ Of 60 kilograms each. 3/ Negligible. 4/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-Octobar 1971 in that country is shown as production for the 1971-72 marketing year. In Ecuador, however, this is referred to as the 1970-71 crop.

Note: Production astimatee for some countries include cross-border movements.

Foreign Agricultural Service. Prepared or estimated oo the bseis of official statistics of foreign governments, other foreign eourca materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

GREEN COFFEE: U.S. GROSS IMPORTS FOR CONSUMPTION BY MONTHS, 1969-73

(In bags 1/)

Month/year	1969	1970	1971	1972	1973 2/
January February Merch April Mey June	1,111,042 2,014,741 2,195,313 1,663,752	1,788,393 1,840,740 1,715,678 1,638,688 1,643,781 1,890,940	2,001,664 1,530,384 1,479,955 2,031,987 1,760,254 1,939,453	2,547,359 2,172,388 1,137,258 1,146,043 1,783,520 1,452,121	1,996,285 1,843,990 2,101,013 2,039,557 2,494,016 1,709,706
January-June	9,094,938	10,518,220	10,743,697	10,238,689	12,184,567
July	1,476,064 1,778,440 2,326,839 2,167.091	1,549,915 1,611,247 1,354,545 1,713,547 1,596,844 1,382,361	2,131,707 2,719,345 2,737,661 620,868 874,923 1,818,017	1,434,110 1,946,966 2,148,989 2,056,863 1,642,774 1,288,351	5/ 5/ 5/ 5/ 5/
July-December.	11,137,883	9,208,459	10,902,521	10,518,053	<u>5/ )</u> /
Calendar year total	20,232,821	19,726,679	21,646,218	20,756,742	<u>5</u> /
Fiscal year total <u>3</u> /	22,060,681	21,656,103	19,952,156	21,141,210	22,702,620
ICO year total	19,828,123	21,202,991	23,025,162	19,082,562	5/

<sup>1/ 132.276</sup> lb. or 60 kg.

Compiled from U.S. Bureau of Census data.

<sup>2/</sup> Preliminary.

<sup>3/</sup> Year ending June 30 of year shown.

<sup>14/</sup> Year ending September 30 of year shown. ICO is International Coffee Organization.

<sup>5/</sup> Not available.

Area of origin A		Average 1963-67		1971		1972		Jan-June			
	1903	-01	1911		:	1716		1972		: 1973 <b>1</b> /	
	Mil. bags 2/			Per- cent	Mil. bags 2/	Per- cent		Per-		. Per- s cent	
Brazil	7.00	31	5.99	28	6.15	30	3.26	32	2.44	20	
Africa and Asia	6.80	31	8.08	37	7.21	35	3.28	32	4.02	33	
Europe	<u>3</u> /	~	<u>3</u> /	-	.05	~	<u>3</u> /	-	.07	1	
Mild coffees:											
Colombia	3.34	15	2.6h	12	2.71	13	1.48	. 14	1.50	12	
Other South America	1.20	5	1.10	5	1.3h	6	.67	7	.60	5	
Mexico and Central America	3.43	16	3.33	1.6	2.73	13	1.23	12	3.11	25	
Caribbean	.49	2	.51	2	.56	3	.32	3	<u>, 44</u>	1‡	
Total Milds	8.46	38	7.58	35	7.34	35	3.70	36	5.65	146	
Total World	22.26	100	21.65	100	20.75	100	10.24	100	12.18	100	

<sup>1/</sup> Preliminary. 2/ 132.276 lb. or 60 kg. 3/ Less than 5,000 bags.

Compiled from U.S. Bureau of Census data.

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